Getting started with Salesforce

Step 1: Creating Your Salesforce Account

First, you'll need to sign up for a Salesforce account if you don't already have one. Head over to the Salesforce Sign-Up Page. You'll see a form asking for some basic information about you and your company. Go ahead and fill that out.

For developers we can create a developer account on the Developer Edition Sign-Up Page.

Once you've filled out the form and agreed to the terms, Salesforce will send a verification email to the address you provided. Open that email and click the verification link inside. This step is crucial to activate your account.

Step 2: Logging In to Salesforce

Now that your account is set up, it's time to log in. Navigate to the Salesforce Login Page. Enter the email and password you used during the sign-up process, then click **Log In**.

And that's it! You've successfully created a Salesforce account!

Setting Up Your Sandbox Environment (Dependable on Salesforce Version)

A Sandbox in Salesforce is an isolated environment where you can develop, test, and train without affecting your live production data. Salesforce offers different types of Sandboxes, each suited for specific tasks. Let's walk through the process of setting one up.

Understanding Sandbox Types

Salesforce provides several types of Sandboxes. Here's a brief overview of each:

1. **Developer Sandbox**
   - Ideal for individual development and testing.
   - Comes with a copy of your production org's configuration and metadata.
   - Storage limit: 200MB of data and 200MB of files.
2. **Developer Pro Sandbox**
   - Similar to the Developer Sandbox but with more storage.
   - Suitable for more extensive development and testing.

- Storage limit: 1GB of data and 1GB of files.

3. **Partial Copy Sandbox**
   - Contains all your production org's configuration and a sample of your data.
   - Great for testing with a subset of your data.
   - Storage limit: 5GB of data and 5GB of files.
   - Includes a template for selecting data to copy.

4. **Full Sandbox**
   - An exact replica of your production org, including all data and metadata.
   - Best for full-scale performance testing and user acceptance testing (UAT).
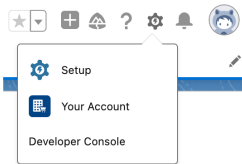   - Storage limit: Same as your production org.

Step-by-Step Guide to Setting Up a Sandbox

1. **Log in to Salesforce**
   - Navigate to Salesforce Login and enter your credentials.

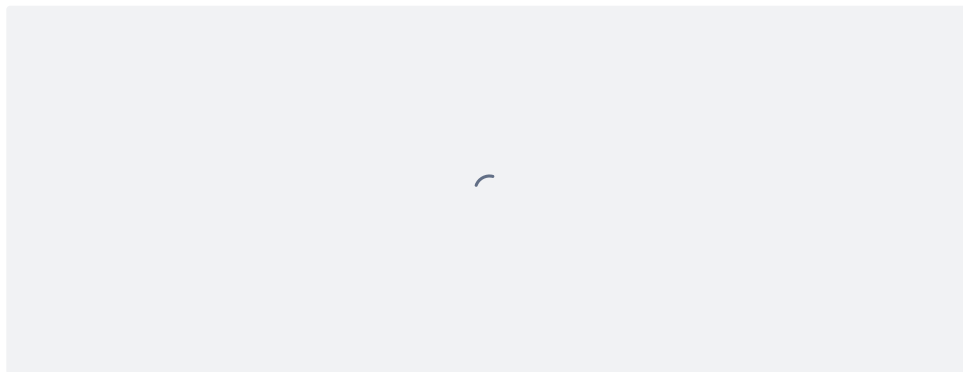2. **Access the Setup Menu**
   - Click the **gear icon** in the upper right corner.
   - Select **Setup** from the dropdown menu.

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3. **Navigate to Sandboxes**
   - In the Setup search bar on the left, type "Sandboxes" and select it from the results.
   - This will take you to the Sandboxes page, where you can manage and create new Sandboxes.

4. **Create a New Sandbox**
   - Click the **New Sandbox** button. This will open a form where you can specify the details of your new Sandbox.

5. **Enter Sandbox Details**
   - **Sandbox Name**: Choose a descriptive name of **10 Character** for your Sandbox (e.g., DevSandbox, TestSandbx).
   - **Description**: Provide a brief description of the Sandbox's purpose.
   - **Create From**: Select from where you would like to clone from. (This is usually Production)

6. **Select Sandbox Type**
   - Choose the Sandbox type that fits your needs: Developer, Developer Pro, Partial Copy, or Full.

- Click on "Next" to continue.
- If you select Partial Copy, you'll need to define a sandbox template that specifies which data to include.

7. **Activate the Sandbox**
   - Click **Create** to initiate the creation of your Sandbox.
   - The creation process might take some time, especially for Full Sandboxes. You'll receive an email notification once the Sandbox is ready.

8. **Accessing Your Sandbox**
   - Once the Sandbox is created, it will appear in the list on the Sandboxes page.
   - Click **Login** next to your new Sandbox to access it. Your Sandbox username will be your production username with the Sandbox name appended (e.g., username.TestSandbx).
     (Please note this will also be the same for authenticating your Apps)